

Query & Analysis XL Financials v10+ for SunSystems - Advanced

Duration: 1 Day

Prerequisite: Have attended the Introduction to Q&A XL v10 course, or have basic working experience of Q&A XL. Knowledge of SunSystems concepts. Basic understanding of MS Excel.

Who Should Attend:

Users who need to design or maintain more advanced Q&A XL reports. Users who need to import data into SunSystems Financials.

What You Will Learn:

At the completion of this training session participants will be competent in the following:

- Extract reference, transaction and balance data into an Excel worksheet (refresher)
- Use various methods of referencing report parameters
- Create more advanced user defined data items
- Combine multiple data output items
- Create Query Templates
- Import a journal with multiple journal types into SunSystems
- Create and use hierarchies in reports
- Create macros to automate functions in Q&A XL
- Create easy to read reports with Report Designer

Please see over page for course content

Course Content – Q&A XL v10+ for SunSystems – Advanced

Q&A XL Fundamentals - Refresher

- Designing various reports to extract reference, transaction and balance data
- Using basic Q&A XL functionality, e.g. wildcard filters, extraction types, recalculate function

Advanced Q&A Functionality

- Using the Formula Fill function to automatically generate Summary Link formulas
- Using Combinations to combine multiple data output items into a single data output item
- Creating User Defined Output items for Daily Sales Outstanding and an Aged Debtor report
- Creating a Format Table within a User Defined Output
- Saving a query as a template
- Using Data Send to import a multi-period and multi-journal type spreadsheet into SunSystems
- Creating and using a hierarchy in a report

Automating and Customising Q&A Queries

- Creating a Q&A XL Macro in Macro Builder
- Using Report Designer to create easy to read reports
- Creating a P&L Actual v Budget report using Filtered Columns